

## **SWD Quick Start Guide for Employees:**

### **ACKNOWLEDGE A NEW PERFORMANCE PLAN**

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### **INITIATE / CREATE PERFORMANCE PLAN**

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## **Introduction**

This guide provides step by step instructions for an employee to acknowledge receipt of a new performance plan for an NSPS rating cycle. This needs to be done after your supervisor (the rating official) has approved the performance plan in the Performance Appraisal Application and has transferred ownership of the plan to you. This is usually done in conjunction with a performance planning conversation between you and your supervisor.

This guide also provides step by step instructions for the employee initiation/creation of their own performance plans. These steps are provided in the event that the employee initiates their own performance plan instead of their supervisor doing this.

## **Accessing the Performance Appraisal Application (PAA)**

If you are not familiar with the PAA, you can access it through the CPOL portal. See the Step by Step guide: Log into CPOL, MyBiz (or My Workplace), and the Performance Appraisal Application at this location: [http://www.swf.usace.army.mil/swd-cpac/NSPS/PerfAppraisalResources/MyBiz\\_MyWorkplace\\_Step\\_Guide\\_Jan07.pdf](http://www.swf.usace.army.mil/swd-cpac/NSPS/PerfAppraisalResources/MyBiz_MyWorkplace_Step_Guide_Jan07.pdf)

The rest of these instructions assume that you have logged into the performance appraisal application through My Biz.

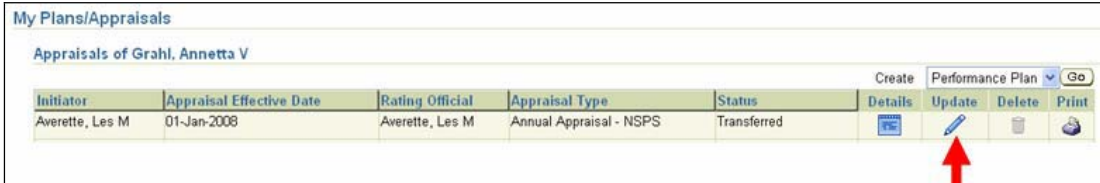

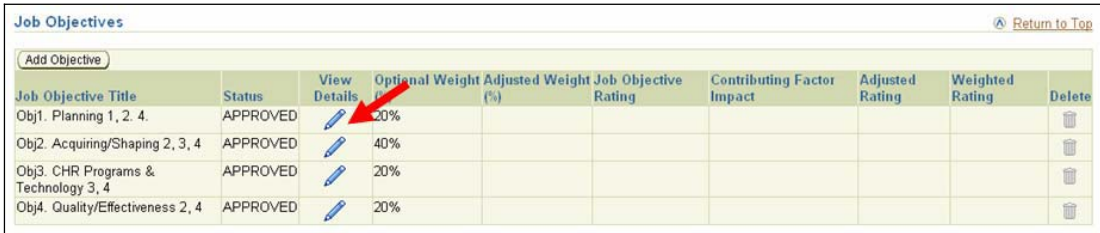
## **Login Problems**



If you have problems with your login please submit a password reset request for your account through the following link:

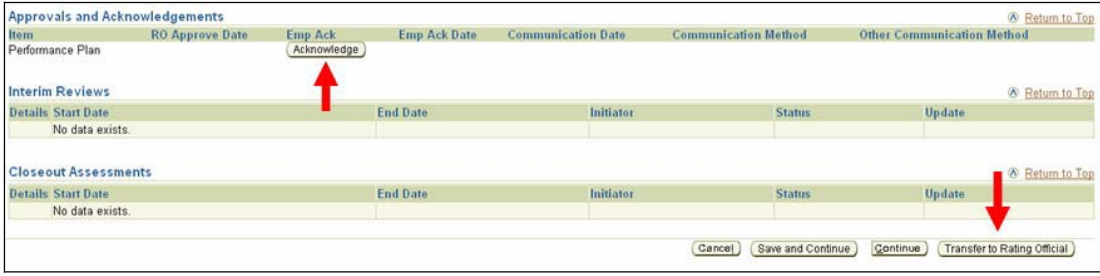

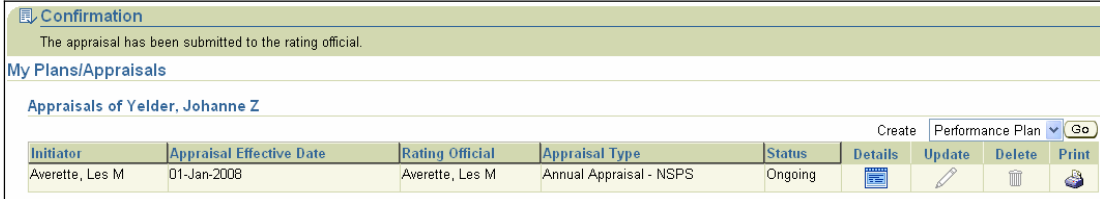
<http://swf-fs2ftwhr.swf.ds.usace.army.mil/MODERN/Account/ResetPassword.asp>

## Acknowledging the Performance Plan

Follow these steps to acknowledge your new performance plan:

Step	Action
1	<p>From the “My Plans/Appraisals” screen (displayed when you log into NSPS Appraisals (My Biz)), click the “Update” icon (blue pencil):</p> 
2	<p>When the performance plan displays, click on the “Job Objectives” link or scroll down until you see the job objectives:</p> 
3	<p>Click on the “View Details” link (blue pencil) next to the first objective (or any specific objectives that you want to examine in more detail):</p> 

4	<p>Each objective is displayed on its own screen; scroll around to see the entire objective and associated contributing factors.</p> <div data-bbox="313 268 1403 1350"> <div> <div>Date Last Modified</div> <div>16-Nov-2006</div> </div> <div> <div>Job Objective</div> <div>           Provide position mgmt and classification advice/assistance to managers and supervisors on a timely basis. Assist with support during CA studies/reviews. Execute recruitment and reduction/reorganization plans/strategies to acquire/maintain a skilled/diverse workforce at 95-98% of desired end strength. Research and explain procedures/automated tools. Keep Supv and Senior Spec informed of issues. Counsel employees on rights; provide mgmt status reports. Measurement:            * Mgmt/Supervisor/CPOC feedback            * Customer Surveys/Employee feedback            * Strategic plans implemented timely            * Service facilitates Cdr desired end strength &amp; skill balance         </div> </div> <div>(Limit to 770 characters)</div> <div>▶ <a href="#">Need Help to Write Objectives</a></div> <div> <div>Working Version Job Objective</div> <div></div> </div> <div>(Limit to 2000 characters)</div> <div> <div>Contributing Factors</div> <div> <input type="checkbox"/> Technical Proficiency ⓘ  <input type="checkbox"/> Critical Thinking ⓘ  <input type="checkbox"/> Cooperation and Teamwork ⓘ  <input checked="" type="checkbox"/> Communication ⓘ  <input checked="" type="checkbox"/> Customer Focus ⓘ  <input type="checkbox"/> Resource Management ⓘ  <input type="checkbox"/> Leadership ⓘ         </div> </div> </div>
5	<p>When you are done, click either the &lt;<b>Apply and Update Next</b>&gt; button (to go to the next objective), or the &lt;<b>Apply</b>&gt; button if you are done reviewing objectives.</p> <div data-bbox="313 1476 1187 1604"> <div> <div>Cancel</div> <div>Save and Continue</div> <div>Apply and Update Next</div> <div>Apply</div> </div> <div>   </div> </div>

6	<p>Scroll down to the “Approvals and Acknowledgements” section and click the <b>&lt;Acknowledge&gt;</b> button. This is acknowledging that you have received the performance plan.</p> 
7	<p>Finally, click the <b>&lt;Transfer to Rating Official&gt;</b> button at the top or bottom of the screen. On the “Share Appraisal Details with Rating Official” screen, click the <b>&lt;Submit&gt;</b> button.</p> 
8	<p>On the “My Plans/Appraisals” screen, you will receive a confirmation message that the appraisal has been sent to the rating official, and your update pencil will be grayed out since you no longer “own” the appraisal.</p> 

## Accessing your Appraisal and Job Objective during the Rating Cycle

Once your performance plan has been established, you can access and view it any time whether you have ownership or not. From the “My Plans/Appraisals” screen (see illustration with step 8, above):

- Click on the Details icon to open the appraisal, where you can view the objectives, or
- Click the Print icon, which generates an Adobe Acrobat copy of the entire Performance Appraisal form (DD Form 2906) which you can print or save.

## Employee Creation of their own Performance Plan

There are two approaches to creating a performance plan:

- Your rating official notifies you that he or she would like you to create the plan, and you create it.
- Your rating official creates the plan.

In either case, you and your rating official should have a conversation, or some form of communication, regarding expectations for creating and finalizing your performance plan. In order to draft your performance plan, you need certain information such as the rating cycle start date and your relevant organizational mission/strategic goals. If you do not know this information, make sure you get it from your rating official before you begin.

The typical steps in the performance plan process are as follows. The step covered in this section is bold and italicized:

1. ***The employee or rating official creates the performance plan and enters draft job objectives and contributing factors (the rating official can enter optional weights for the job objectives as well).***
2. The employee and rating official edits or adds to the performance plan content as needed. This process may involve multiple rounds of editing and transfers between you and your rating official before the plan is finalized.
3. The rating official approves the final job objectives, contributing factors, and optional weights for the job objectives.
4. The employee reviews the performance plan and acknowledges that it was communicated to him or her.
5. The rating official approves the performance plan.

Follow these steps to create a performance plan:

Department of Defense  
Performance Appraisal Application

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My Appraisals

My Plans/Appraisals

Appraisals of Smith, Jeffery

Create Performance Plan **Go**

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
No data exists.								

Completed Plans/Appraisals

Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Initiator: Last Name, Title, First Name

Appraisal Effective Date: (example: 29-Sep-2006)

Appraisal Type: (dropdown)

Go Clear

Initiator	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						

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The **Go** button on the *My Plans/Appraisals* page

1. Select the **Go** button from the *My Plans/ Appraisals* page, next to the Create the Performance Plan drop-down menu, to go to the *Create Performance Plan: Setup Details* page.

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Setup Details Overview Review

Create Performance Plan: Setup Details

Cancel Save and Continue Transfer to Rating Official Step 1 of 3 **Next**

Employee Name Jeffery Smith Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01

Position 01206.BUDGET ANALYST.73293.DD48.APR Location Rosslyn, US

Occupational Code 0560.Budget Analyst (NSPS) Pay Plan/Pay Band YA-03

Employee Number 36728

Work Schedule Full-Time Assignment Status Active Appointment

Setup Details

Current Base Salary 80979  
Minimum Pay Band Level 74608  
Maximum Pay Band Level 124904

\* Indicates required field

\* Appraisal Type Annual Appraisal - NSPS

\* Rating Cycle Start Date 01-Oct-2006 (example: 20-Sep-2006)

\* Rating Cycle End Date 30-Sep-2007 (example: 20-Sep-2006)

Performance Plan Approval Date (example: 20-Sep-2006)

Performance Plan End Date 30-Sep-2007 (example: 20-Sep-2006)

\* Appraisal Effective Date 01-Jan-2008

\* Rating Official McLean, James

\* Performance Indicators Professional/Analytic Band 3

Rating Cycle Start Date should be: 21-Jan-2007

Cancel Save and Continue Transfer to Employee Step 1 of 3 **Next**

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Fields populated on the *Create Performance Plan: Setup Details* page with the **Next** button indicated

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Setup Details Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Rating of Record and Comments Interim Reviews Closeout Assessments

**Create Performance Plan: Overview**

Cancel Save and Continue Transfer to Rating Official Back Step 2 of 3 Next

Employee Name **Jeffery Smith** Organization **CIVILIAN PERSONNEL MANAGEMENT SERVICE**  
Position **01206.BUDGET ANALYST.73293.DD48.APPR** Location **DD48H50000 01**  
Occupational Code **0560.Budget Analyst (NSPS)** Pay Plan/Pay Band **YA-03**  
Employee Number **36728**  
Work Schedule **Full-Time** Assignment Status **Active Appointment**  
Pay Pool ID

**Placement in Pay Band**

Current Base Salary **80979**  
Minimum Pay Band Level **74608**  
Maximum Pay Band Level **124904**

**Setup Details** [Return to Top](#)

Appraisal Type **Annual Appraisal - NSPS** Rating Official **McLean, James**  
Rating Cycle Start Date **01-Oct-2006** Performance Plan Approval Date  
Rating Cycle End Date **30-Sep-2007**

**Relevant Organizational Mission/Strategic Goals** [Return to Top](#)

1. Provide responsive, best value supplies and services to customers.  
2. Proactively provide budget and contracting support to Program Managers.  
3. Streamline and improve processes to support multi-million dollar contracting efforts.

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**Job Objectives** [Return to Top](#)

Add Objective

Job Objective	Status	Update	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating	Delete
Select Title									
No data exists.									


The **Relevant Organizational Mission/Strategic Goals** field and the **Add Objectives** button on the *Create Performance Plan: Overview* page

4. Enter your organization's goals and mission in the **Relevant Organizational Mission/Strategic Goals** field.



The text you enter in the **Strategic Organizational Mission/Strategic Goals** field becomes read-only to you after you transfer the appraisal.

5. Select the **Add Objective** button to go to the *Add Job Objective* page.


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Overview Review

**Add Job Objective**  
 \* Indicates required field
 Cancel Save and Continue Apply and Add Another Apply

**Placement in Pay Band**  
 Current Base Salary 80979  
 Minimum Pay Band Level 74608  
 Maximum Pay Band Level 124904  
Show Relevant Organizational Mission/Strategic Goals

\* Job Objective Title Job Objective 1 - FY06 Funding  
(Enter up to 80 characters)

\* Start Date 20-Sep-2006  
(example 20-Sep-2006)

Job Objective Status  
 Date Last Modified 20-Sep-2006  
 Job Objective
 

(Limit to 770 characters)
 Need Help to Write Objectives

Working Version Job Objective
 

In support of the SMO mission to oversee the execution of funds and in concert with program goals of optimizing stewardship of resources and budget and performance integration, ensure that all FY06 Central program funds provided to SMO for execution, obligated at 98% by 30 September 2006.
 (Limit to 2000 characters)

Contributing Factors
 

☒ Technical Proficiency  
☒ Critical Thinking  
☒ Cooperation and Teamwork  
☐ Communication  
☐ Customer Focus  
☐ Resource Management  
☐ Leadership

Show Additional Information on Contributing Factors

Optional Weight
 

Job Objective Rating
 Show Job Objective Rating  
Show Performance Indicators

Contributing Factor Impact
 

Show Contributing Factor Impact  
Show Additional Information on Contributing Factor Impact

Adjusted Rating  
 Adjusted Weight  
 Weighted Rating (If Used)
 

Cancel Save and Continue Apply and Add Another Apply

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Make sure to include the objective number in the title!

Start Date should be 21-Jan-2007

You are allowed 770 characters for your actual job objective.

You are allowed 2000 characters for your working version job objective (not the final one, but a working copy that allows you to narrow down to your final objective).

Fields and button options on the *Add Objectives* page



- Complete the page using one of the following options:

If You...	Then...
Want to cancel the work that has been created so far	Select the <b>Cancel</b> button.
Want to apply what has been done so far and add another job objective	Select the <b>Apply and Add Another</b> button. Repeat step6.
Want to continue to work on the same page or navigate to other functions	Select the <b>Save and Continue</b> button. Go to Step 8.

- Select the **Apply** button to add all job objectives and go to the *Create Performance Plan: Overview* page.

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Setup Details Overview Review

Setup Details Relevant Organizational Mission/Strategic Goals Job Objectives Rating of Record and Comments Interim Reviews Closeout Assessments

**Create Performance Plan: Overview**

Cancel Save and Continue Transfer to Rating Official Back Step 2 of 3 **Next**

Employee Name Jeffery Smith Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE  
Position 01206.BUDGET ANALYST.73293.DD48.APPR DD48H50000 01  
Occupational Code 0560.Budget Analyst (NSPS) Location Rosslyn, US  
Employee Number 36728 Pay Plan/Pay Band YA-03

Work Schedule Full-Time Assignment Status Active Appointment  
Pay Pool ID

**Placement in Pay Band**

Current Base Salary 80979  
Minimum Pay Band Level 74608  
Maximum Pay Band Level 124904

**Setup Details**

Appraisal Type Annual Appraisal - NSPS Rating Official McLean, James  
Rating Cycle Start Date 01.Oct.2006 Performance Plan Approval Date  
Rating Cycle End Date 30-Sep-2007

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The **Next** button on the *Create Performance Plan: Overview* page

- Select the **Next** button to go to the *Create Performance Plan: Review* page.

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Setup Details Overview **Review**

▼ Relevant Organizational Mission/Strategic Goals ▼ Job Objectives ▼ Employee Self-Assessment ▼ Rating of Record and Comments

**Create Performance Plan: Review**

Cancel Save and Continue Back Step 3 of 3 **Transfer to Rating Official**

Employee Name Jeffery Smith Organization CIVILIAN PERSONNEL MANAGEMENT SERVICE DD48H50000 01  
Position 01206.BUDGET ANALYST.73293.DD48.APPR Location Rosslyn, US  
Occupational Code 0560.Budget Analyst (NSPS) Pay Plan/Pay Band YA-03  
Employee Number 36728  
Work Schedule Full-Time Assignment Status Active Appointment  
Pay Pool ID

To make changes to the appraisal, click Back.

**Setup Details**

Appraisal Type Annual Appraisal - NSPS Rating Official McLean, James  
Rating Cycle Start Date 01-Oct-2006 Performance Plan Approval Date  
Rating Cycle End Date 30-Sep-2007

**Relevant Organizational Mission/Strategic Goals** Return to Top

1. Provide responsive, best value supplies and services to customers.  
2. Proactively provide budget and contracting support to Program Managers.  
3. Streamline and improve processes to support multi-million dollar contracting efforts.

**Job Objectives** Return to Top

Show All Details Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Show Job Objective 1 - FY06 Funding	Job Objective 1 - FY06 Funding	PENDING						

**Employee Self-Assessment** Return to Top

**Rating of Record and Comments** Return to Top

Rating of Record  
Rating Official Assessment

Cancel Save and Continue Back Step 3 of 3 **Transfer to Rating Official**

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**Show** and the **Transfer to Rating Official** button on the *Create Performance Plan: Review* page

10. Review information entered on the performance plan. You can review all the information you have entered on the performance plan before submitting it to your rating official for review and edits. To view a job objective, select **Show**. To collapse the job objective, select **Hide**. This function is available throughout the application.

**Job Objectives** Return to Top

Show All Details Hide All Details

Details	Job Objective Title	Status	Optional Weight (%)	Adjusted Weight (%)	Job Objective Rating	Contributing Factor Impact	Adjusted Rating	Weighted Rating
Hide Job Objective 1 - FY06 Funding	Job Objective 1 - FY06 Funding	PENDING						

Job Objective  
Working Version Job Objective In support of the SMO mission to oversee the execution of funds and in concert with program goals of optimizing stewardship of resources and budget and performance integration, ensure that all FY06 Central program funds provided to SMO for execution, obligated at 98% by 30 September 2006.  
Contributing Factors Technical Proficiency, Critical Thinking, Cooperation and Teamwork,  
Last Modified Date 20-Sep-2006

The *Job Objectives* section with an objective expanded after selecting **Show**

11. Select the **Transfer to Rating Official** button to go to the *Share Appraisal Details with Rating Official* page.

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**Share Appraisal Details with Rating Official**  
When you click Submit, ownership of this appraisal transfers to the Rating Official.

Cancel Submit

**Notification Message for Rating Official**

I have created my performance plan. Please review and edit.

Cancel Submit

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The **Submit** button on the *Share Appraisal Details with Rating Official* page

12. Enter comments to your rating official in the **Notification Message for Rating Official** field. Your message will show up in your rating official's **Notifications** tab.
13. Select the **Submit** button to send the performance plan to your rating official and go to the *My Plans/Appraisals* page.

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Notifications Appraisals

**My Appraisals**

**Confirmation**  
The appraisal has been submitted to the rating official.

**My Plans/Appraisals**

**Appraisals of Smith, Jeffery**

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Status	Details	Update	Delete	Print
Smith, Jeffery	01-Jan-2008	McLean, James	Annual Appraisal - NSPS	Ongoing				

**Completed Plans/Appraisals**  
Please enter your search criteria and select the "Go" button to see the result. Note that the search is case insensitive.

Employee:

Appraisal Effective Date:

Appraisal Type:

Go

Employee	Appraisal Effective Date	Rating Cycle Start Date	Rating Cycle End Date	Appraisal Type	Details	Delete
No data exists.						





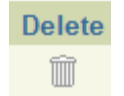

View All Appraisals By Employee

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The *My Plans/Appraisals* page

## ***Congratulations!***

You have just created the performance plan and entered draft job objectives and contributing factors. It is now transferred to your rating official for his or her review.

Icon	Description
	<p>Selecting the <b>Details</b> icon displays a different set of read-only information depending on the screen on which it is located. You can view the appraisal for information only up to the last sharing point.</p>
	<p>The highlighted pencil under the <b>Update</b> column indicates that you have ownership of the appraisal.</p>
	<p>The grayed-out pencil under the <b>Update</b> column indicates that the rating official has ownership of the appraisal.</p>
	<p>The highlighted trash can under the <b>Delete</b> column indicates that the appraisal can be removed permanently from the system.</p>
	<p>The grayed-out trash can under the <b>Delete</b> column indicates that the appraisal cannot be removed from the system.</p>
	<p>Selecting the <b>Print</b> icon allows you to print the form with completed information. At this time, only the performance plan will be printed and only approved job objectives will appear on the form.</p>